

# AGENDA SUPPLEMENT (1)

**Meeting:** Schools Forum  
**Place:** Online meeting  
**Date:** Thursday 7 October 2021  
**Time:** 1.30 pm

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The Agenda for the above meeting was published on 29 September 2021. Additional documents are now available and are attached to this Agenda Supplement.

Please direct any enquiries on this Agenda to Lisa Pullin, Tel 01225 713015 or email [committee@wiltshire.gov.uk](mailto:committee@wiltshire.gov.uk), of Democratic Services, County Hall, Bythesea Road, Trowbridge.

Press enquiries to Communications on direct lines (01225)713114/713115.

This Agenda and all the documents referred to within it are available on the Council's website at [www.wiltshire.gov.uk](http://www.wiltshire.gov.uk)

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## 8 Updates from Working Groups (Pages 3 - 18)

The minutes from the joint meeting of the School Funding and SEN Working Group held on 27 September 2021 are now attached.

The minutes from the meeting of the Early Years Reference Group held on 21 September 2021 are now attached.

DATE OF PUBLICATION: 5 October 2021
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## Schools Forum

### School Funding and SEN Working Group

#### MS TEAMS MEETING

27<sup>th</sup> September 2021

#### Minutes

**Present:** Marie Taylor (Chair), (Finance, local authority ((LA)), Grant Davis (Finance, LA), John Hawkins (Teacher / Governor rep), Catriona Williamson (Mere), Andy Bridewell (Ludgershall Castle), Lisa Percy (Hardenhuish), Cate Mullen (Head of Inclusion & SEND, LA), Rebecca Carson (Woodford Valley), Sam Churchill (Hilmarton), Helean Hughes (Director LA), Georgina Keily-Theobald (Downland), Graham Shore (Holy Trinity) and Graham Nagel-Smith (Morgan's Vale & Woodfalls)

**Apologies:** Simon Thomas and Alison Enever (LA) who will provide updates at the SF meeting. Gary Binstead, (LA) Bea Seggari (LA)

1.	<p><b>Welcome and Apologies</b></p> <p>MT welcomed the group to the virtual meeting. A benefit of the virtual meeting is that heads are still located at school and therefore able to dip in and out if required. Several heads had pre-warned MT of this, due to open school events etc.</p>	
2.	<p><b>Minutes</b></p> <p>These were considered at Schools Forum in June – no actions outstanding.</p>	
3.	<p><b>Matters Arising</b></p> <p>There were no matters arising.</p>	
4.	<p><b>School Revenue Balances 2020-21 (GD)</b></p> <p>GD shared his report and appendices showing the year end balances for maintained schools. Overall, schools balances (net) have increased from 2020-21, this could be a combination of factors but likely to include the impact of the pandemic, school closures and COVID funding. There are two flags which could trigger a DfE investigation – firstly around schools carrying a surplus long term and the polar opposite, schools in deficit for an elongated time. The group noted the report and the increased overall net position.</p>	
5.	<p><b>Budget Monitoring for the period to 31st August 2021 (MT)</b></p> <p>MT shared her report with the group. The forecast overspend for 21/22 is £8.227m which is slightly less than the last FY overspend so it could increase as the September placements firm up.</p> <p>Highlights:            Early Years – (0.083M) small favourable variance, EY will have a separate DSG reserve wef 1<sup>st</sup> April 2021. COMF rollover &amp; new year allocation of £0.6M which is good news</p> <p>School Budgets – (1.328M) the underspend is largely driven by the growth fund and this offsets the DSG overspend position.</p>	

	<p>The HNB overspend is £9.643m – again, based on higher numbers of EHCPs and levels of support requested.</p> <p>The pressures on the HNB continue and the HNB working group will be prioritising demand management, savings projects, commissioning and spend controls.</p> <p>Of major concern remains the impact of this on the DSG deficit reserve balance which is held in the local authority’s balance sheet. The reserve balance is now forecast to be £26.701m at 31<sup>st</sup> March 2022.</p> <p>This overspend will continue to be cash flowed by the local authority as per the DfE guidance.</p> <p>There were no comments from the group.</p>	
6.	<p><b>School Revenue Funding 2022-23 (GD)</b></p> <p>GD shared his report, £7.1bn national increase for 22-23 with 3% on all pupil led factors Wiltshire, using October 20 census data (so will be updated with the final allocations) 3.33%, HNB 8.39% and CSSB 6.07% increases – no EY updates at this stage 21-22 decisions were taken around mobility, other NFF factors, sparsity (3% uplift not the NFF values), 2.0% MFG, 0.5% transfer to HNB, de-delegation for maintained schools. Schools Forum will be asked to consider factors and make ‘in principle’ decisions in December with the final budget setting voting taking place in January once the DfE final allocations are received late December. MT commented she was most interested to hear about the next 3 years in light of CPI increases, NI increases, teachers pay freeze etc. There is a new spending review period as well as a new Minister, so this is currently unknown.</p>	
7.	<p><b>DfE Consultations – Autumn 2021 (GD)</b></p> <ul style="list-style-type: none"> <li>(a) Business Rates – a straightforward change – the DfE will pay the local authority on actual invoices so less of an admin burden on schools and the LA. No financial impact.</li> <li>(b) Fair school funding – the working group met exceptionally early in September to consider this consultation as the deadline for responses was 30/09/21. The Schools Forum response has been shared with school leaders via Right Choice, PHF, WASSH etc to ensure maximum response rate. In Wiltshire we align closely to the NFF so minimum impact however, other changes mooted to central school services block and proposal around moving the financial year to align to the academic year for maintained schools. Officers will report the DfE responses / changes in due course.</li> <li>(c) SEN Review – still overdue and anticipated with no firm date from the DfE.</li> </ul>	
8.	<p><b>DfE Sparsity Update (GD)</b></p> <p>GD took the group through the proposed changes to sparsity. Sparsity is only 0.2% of overall school funding. The changes would increase overall funding but also the formula better reflects need – for example, as the crow flies is replaced by miles by road and the distance includes a threshold taper allowing further flexibility &lt; 20%. There are three options</p>	

	<p>of local flexibility until the hard formula in 23/24* (or beyond if further delays)</p> <ul style="list-style-type: none"> <li>(a) Fixed – unaffordable</li> <li>(b) NFF Tapering – this mirrors the DfE funding and would be cost neutral</li> <li>(c) Tapered (old version) – this would cost less than the DfE funded level but not flexible on the distance threshold</li> </ul> <p>MT commented that (b) would align Wiltshire to the NFF when it is rolled out in 23/24* GD raised concerns he had around given the formula had been made eminently more sensible and flexible with tapering, if any small Wiltshire schools were in financial difficulties, Schools Forum could face challenge / questions around why this had not been adopted. LP asked are 50 primary and 3 secondary the same schools to receive the funding, whichever method is adopted. SC commented small, rural schools without facilities did incur additional costs e.g.: coach to swimming lessons however, we could use any unallocated funds to help offset the HNB overspend. LP commented that may be robbing Peter to pay Paul and realistically the HNB issue needed support at national level and supporting our small rural schools may have more impact locally.</p>	
9.	<p><b>High Needs Working Group Update (CM)</b></p> <p>CM updated the group on the recent updates which included Cabinet approving 35 additional posts in the SEN &amp; Inclusion service around statutory SEN, Ed Psychs and EY inclusion officers – to aid workload and case management in light of the significant increase in demand since the C&amp;F Act in 2014. Recruitment underway. MT commented how bespoke some of the posts were and how important it was to get experienced, skilled staff, CM said there would be a period of time for recruitment and training before we enjoyed the full benefits of the investment.</p> <p>CM updated on the recovery group and the importance of holding each other to account. The recovery plan has three themes; EY &amp; prevention, Statutory Processes &amp; Quality, Assessment &amp; Monitoring. At SF CM will spotlight on the changes made to the internal processes with an external consultant and the three-pronged DaD approach.</p> <p>DaD1 start an assessment? DaD2 issue a plan? Request changes DaD3 high-cost places.) Schools are part of the new processes now and after Christmas, CM wants parents and carers to be involved too.</p> <p>The meetings with the DfE have not provided any new insights however CM conformed that the 5 local authorities who the DfE had offered to assist financially with strict guidelines attached, asked them to focus on their decision making e.g.: Bury. It is hoped these processes should impact positively on HNB funding.</p> <p>Finally, CM shared that there had been articles in the national press recently (Guardian) raising awareness around shortages of SS place, EPS, Sp &amp; L therapists - which families may read and have concerns about.</p>	
10.	<p><b>Annual Local Consultation – Autumn 2021 (GD)</b></p> <p>GD took us through the annual consultation questions around de-delegated and a potential 0.5% transfer to HNB from SB.</p> <p>MT commented – would it be useful to add “only if the NFF is affordable would a 0.5% be agreed by SF – the group agreed, GD to action prior to circulation</p> <p>SC – happy to have that and any more detail which would help schools to understand and respond. Better to share the pain across all schools than focus on EHCP pupils. PHF and WASSH can promote. GD and MT to</p>	<p>GD</p> <p>GD/MT</p>

	draft letter to PHF/WASSH to encourage members to respond. GN-S asked whether the impact of the transfer was across all schools – yes, it is and this is to be made clearer so ensure academies engage.	GD
11.	<p><b>Verbal Updates</b></p> <p><b>a) SWAP (Internal Audit)</b> GD shared the SWAP report: Schools forum Governance benchmarking report which was commissioned by another local authority and we (having taken part) benefit from the report. Something for us to pick up is training of new Schools Forum members (this is done for councillors but not other Schools forum reps.)</p> <p><b>b) COVID Funding</b> DfE COVID recovery premium – based on pupil premium pupils, average £6k for a primary and £20k for a secondary – individual allocations will be on right choice on Friday. DfE Schools Led tutoring is expected next COMF Flexible Pastoral Support – a local authority offer - officers are working with the Alliance on how to best deliver this to schools.</p>	GD/MT
12.	<p><b>AOB</b></p> <p>a) There will be an update from Simon Thomas (FACT) at the meeting b) Following the retirement of Neil Baker, a potential Chair and deputy have been approached and have agreed to take up the positions, proposers and seconders needed for the meeting, please.</p>	
10	<p><b><i>Date and Time of Next Meeting</i></b></p> <p>It was noted that heads have been called away this morning, is a Monday morning best avoided? MT asked the group their thoughts; no one felt any one day was better than another.</p> <p>December could be a virtual, face to face or hybrid (County Hall technology permitting) meeting – further discussion with the Chair &amp; deputy nearer the time as the agenda is issued is suggested.</p> <p>Next meeting – Monday 29<sup>th</sup> November 2021 @ 8.30am This is planned as a possible virtual teams meeting.</p> <p>Next Schools Forum meetings are Thursday 7<sup>th</sup> October (via Microsoft Teams) and then Thursday 9<sup>th</sup> December 2021 @ 1.30pm planned as a hybrid/face to face meeting (subject to current guidance). Papers will be circulated by Lisa Pullin Wednesday 29<sup>th</sup> September and 1<sup>st</sup> December 2021 for those meetings.</p>	MT

## Early Years Reference Group Meeting

Tuesday 21 September 2021

### 1. Welcome and introductions

Lucy-Anne Bryant (LAB), Jo Clarke (JC), Rosemary Collard (RC), Emma Cooke (EC), Grant Davis (GD), Jenny Harvey (JH)(notes), Sarah Hawkins (SH), Deborah Muir (DM), Emma Osmund (EO), John Proctor (JProctor), Jane Provis(JProvis)

### 2. Apologies

Gary Binstead, Lyssy Bolton, Jane Boulton, Angela Everett, Russ Martin, Claire Shipley, Marie Taylor, Emily Wood

### 3. Introduction of new members

Jackie Day (Bright Stars Nursery)

### 4. Minutes of last meeting (19 May 2021)

The group approved the minutes as a true and accurate record.

### 5. Matters arising

Item 5 - Business rates for nurseries. GD advised he had no update.

Item 5 – COMF bid. LAB confirmed that there is still unspent COMF, discussions are underway about how to use this funding across the county, any updates will come to the group and then out via the newsletter.

Providers are currently to inform Wiltshire Council of positive cases via the Right Choice survey. EO couldn't recall seeing the link to this recently and suggested that perhaps it needed to be given higher priority within the EY Newsletter. EC confirmed it was further down the Newsletter but would ensure it was moved nearer the top. Jackie Day queried whether a room closure rather than a full setting closure would be eligible for COMF, LAB confirmed that it would be if the funding is agreed.

Item 5 – Garrison welfare contacts. SH confirmed that this is still outstanding.

Item 5 – New Schools Forum representative. JProctor and LAB confirmed no offers had been received as yet. This will be discussed later in the meeting.

Item 8 – Local Outbreak Management Plan (LOMP) – EC confirmed this had been done at the time of the last meeting and a new version was sent out with the last EY Newsletter.

**ACTION:** MT to liaise with Director of Resources on nursery business rate guidance.  
SH to liaise with Helen Edwards-Matheou regarding garrison welfare officer contacts.

### 6. Finance and the role of Schools Forum (MT)

GD gave a presentation to the group about Schools Forum, a copy of the presentation is attached to the minutes.

Who? – comprised of members from all areas of education including primary, secondary, Early Years, headteacher unions, FE sector, Diocese, Wiltshire Governors Association. There are 20 members with voting powers. Early Years Reference Group is a sub-group of Schools Forum and is primarily finance focused.

What? - their role is to look at how all funding is allocated and acting upon the best information available to fund children. In general, High Needs is the main area of discussion where currently demand is far exceeding the budget.

Why? – to ensure funding is allocated and spent properly whilst meeting the needs of the children

When? – there are 4 public meetings per annum, with December and January being the busiest meetings as key funding decisions are on the agenda based on DfE budget notifications that have been received.

Where? – Currently, meetings are held virtually. Hybrid meetings are being looked into which would enable both actual and virtual attendance.

All papers are public and are held on the Wiltshire Council website. It is critical that Early Years is represented at the group ensuring a sector voice and perspective is heard.

GD stated that Schools Forum is a public meeting and is open to all to attend as observers. DM offered to volunteer, with JD and EO acting as reserves if JP and DM are unable to attend. JP confirmed the next meeting is scheduled for 7<sup>th</sup> October. GD and JH to liaise re: new member representative contact details.

**ACTION: JH to forward Schools Forum meeting link to group members**

**JH to forward new EYRG representative contact information to relevant Democratic Officer for the next meeting.**

## 7. Inclusion Support Funding (AE)

On behalf of AE, Jane Provis (JProvis) gave the group an update on ISF. Payments for successful applications have moved from 3 times a year to once a year (for academic year). There will still be monthly meetings for the 2 halves of the county. There are 2 bandings - band 1 being the lowest rate, and band 2 being the highest rate and more in line with a District Specialist Centre. Payment can only be made for up to a maximum of 15 hours per week, term time only.

EO queried if there was any way the ISF maximum hours cap could be looked at. Some children will initially start accessing 15 hours and then become eligible for the 30 hours, and early years providers only get funding for up to 15 hours. Both JProvis and GD confirmed that the cost for EY High Needs used to come from High Needs budget. Approximately 3 years ago, Schools Forum agreed that any EY surplus funds should be transferred to the High Needs budget for EY High Needs. JProctor asked how surplus funds could now be ringfenced by EY instead of being transferred to High Needs. GD confirmed that this would be a Schools Forum decision, but would take the issue up with MT. *Since the meeting, MT has confirmed that she included this in her last Schools Forum budget monitoring report and had proposed a separate ringfence from 01/04/2021. This was accepted and the reserve will now be shown in two sections as shown in the excerpt below.*

DSG Reserve	Early Years Ringfence (effective 01-04-21)	Schools Block, HNB & Central	Total 20/21 FY
Balance Brought Forward from 20/21		18.474	18.474
Early Years Adjustment 20/21 prior year			
Forecast variance 21/22	-0.083	8.310	
Estimated balance CFWD 2022	-0.083	26.784	18.474



EW asked if payments would be made in arrears or upfront. JProvis confirmed that the payment changes would be happening with immediate effect, and that for those providers who applied over summer (deadline of end of July) will be paid in September

SH queried missing ISF payments which have been chased, but without success. The missing payments have had a knock on effect with staffing and income. JProvis apologised for the delay and is aware of such issues but assured the group that the team is working to resolve them as swiftly as possible. The new system will be used to predict placement need because of increasing placements outside of catchment areas and no localised places in specialist schools.

JD asked if there could be a separate banding for children that are unable to attend without additional adult. These situations cause sustainability issues and have a huge financial impact for early years providers. Early years providers are taking a higher number of children with higher needs as the DSCs are unable to accept more children. JProvis suggested that early years providers write to their local MPs to make them aware of this issue.

JC commented that she had received money for children not in her setting. It has been raised as an issue but is still awaiting resolution. JProvis is aware of this issue.

GD commented that lobbying local MPs is a good idea. He confirmed that we are coming to the end of the current spending review period, and discussions will be taking place on the next 3 years. It would be considered beneficial to get the early years voice heard on funding with a view to increasing the funding pot.

**ACTION: GD to raise EY High Needs budget transfer issue with MT for raising at Schools Forum**

#### **8. Local Provider Agreement (JH/All)**

The draft Local Provider Agreement had been emailed to all group members prior to the meeting. As well as general feedback, group members were asked to consider 2 specific points:

- a) Would they be happy if the annual indicative funding estimate document was reinstated, and would they be happy to receive this document solely in an electronic format?

Group members agreed that it would be beneficial to start receiving this document again, and an electronic copy would be acceptable.

- b) Would they like Wiltshire Council to offer more flexibility to parents enabling mid-term moves for any reason, instead of the current list of 6 only?

Group members agreed that more flexibility should not be given to parents for mid-term moves. However, the current list of 6 valid reasons will be expanded to include change of employment as different childcare might be required, i.e., military postings.

It was also felt that it needed to be made explicitly clear that if a parent's mid-term move did meet one of the valid reasons, then the notice period in line with the contract signed with the individual early years provider must still be adhered to.

Another point to be made clearer is that of late starters with no prior attendance at another provider, and that they can be accepted for funding.

It was suggested the wording in Section 4, point i) - non submission of all data collections, should be amended to 'Failure to do so may result in delayed or suspended funding'.

**ACTION: JH to make agreed changes to Provider Agreement document and forward copy to members just before main sector distribution**

**9. AOB**

JH confirmed that a resignation had been received from Bid Lilywhite (school representative). Another representative will need to be sought. LAB has some possible replacements in mind. There is also a childminder representative position still outstanding.

JProctor queried if any communication had been received Trudi Surman, no apologies had been received for this meeting.

**ACTION: LAB to make contact with possible representative replacements**

**JH to contact Trudi Surman regarding continuing group membership**

**10. Date of next meeting**

The next meetings are scheduled as follows:

Wednesday 17<sup>th</sup> November 2021 at 1pm

Wednesday 5<sup>th</sup> January 2022 at 1pm.

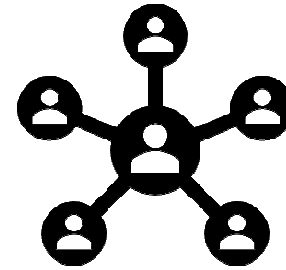
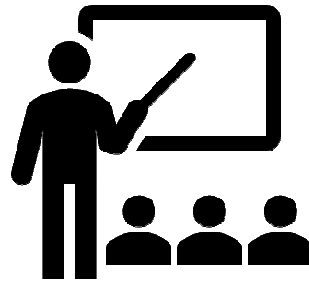
# Early Years Reference Group - Finance Update

March 2021

## Schools Forum

Have you heard of Schools Forum?

- Who
- What
- Why
- When
- Where



- [Schools Forum Papers](#)

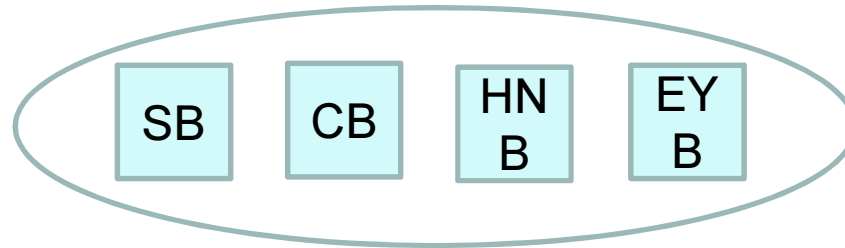
# School Funding & Financial Framework

## Main grants supporting school revenue budgets

- Dedicated Schools Grant (**DSG**)

*Use prescribed by regulation and allocated to LA in 4 blocks*

- Schools block
- Central services block
- High needs block
- Early years block



- Post 16 funding

*National 16-19 funding formula to fund 6<sup>th</sup> form provision in schools*

- Pupil Premium

*Targets funding at vulnerable pupils*

## Blocks – What are they?

- **Schools Block** – funds mainstream schools
- **Central Block** – for services to all schools (maintained or academy), e.g. Admissions, Strategic Property Planning, School Funding
- **High Needs Block** – Special schools, Resource bases, ELPs, NPAs, SEN Support Teams
- **Early Years Block** – Nurseries and early years settings, funding for 2 year olds and 3&4 year olds
- Each Block has a separate formula and is accounted for separately
- Approval required for transfers between Schools Block & High Needs Block (2020-21 and 2021-22 – 0.5%)

## Blocks – What are they?

<b><u>Block</u></b>	<b><u>2021-22</u></b>
Schools Block	£317,724,345
Central Block	£2,565,122
High Needs Block	£57,835,120
Early Years Block	£28,217,273
<b>TOTAL FUNDING</b>	<b>£406,341,860</b>



## Blocks – Comparison over 3 years

	<u>2019-20</u>	<u>2020-21</u>	<u>2021-22</u>	<u>Increase</u>	<u>Pay &amp; Pens.</u>
Schools Block	275,215,164	293,142,767	303,545,131	10,402,364	14,179,214
Central Block	2,570,343	2,479,715	2,455,503	-24,212	109,619
High Needs Block	47,091,825	51,996,188	57,029,690	5,033,502	805,430
Early Years Block	26,768,825	26,884,359	28,217,273	1,332,914	0
<b>TOTAL FUNDING</b>	<b>351,646,157</b>	<b>374,503,029</b>	<b>391,247,597</b>	<b>16,744,568</b>	<b>15,094,263</b>

Teachers Pay and Pension Grants now built into the Schools Block baseline, funded at £14,179,214 for 2021-22. Therefore, the 'real' increase is £10,402,364



## Any Questions?



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